

Delegating and Revoking (take back) Your Worklist in TA Overview

This document provides the step-by-step instructions for delegating and revoking your worklist to another person or Proxy, who can then approve or deny designated HCM transactions on your behalf.

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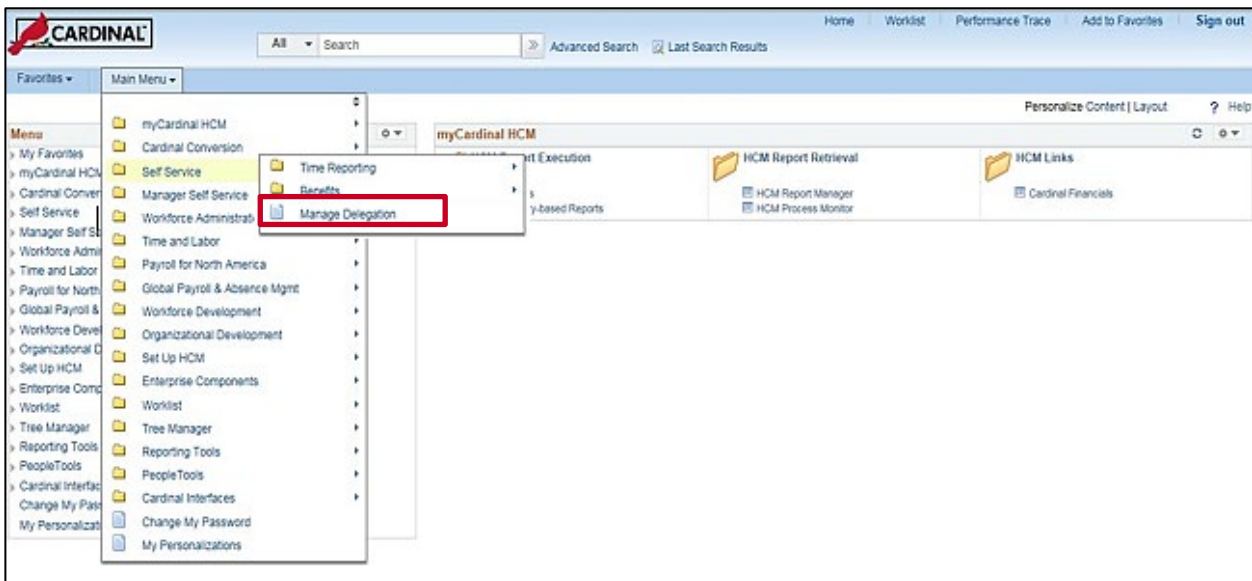
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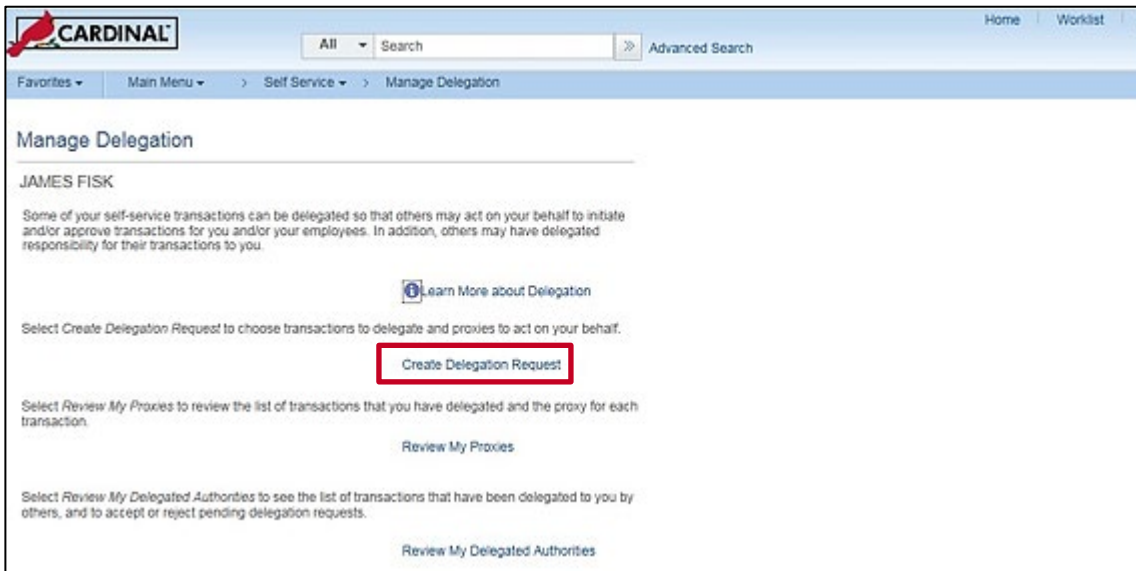
Delegating Your Worklist

The steps below provide step-by-step instructions on how to delegate your worklist:

1. Sign into Cardinal and access **Cardinal HCM**.
2. Navigate to the **Manage Delegation** page using the following path:

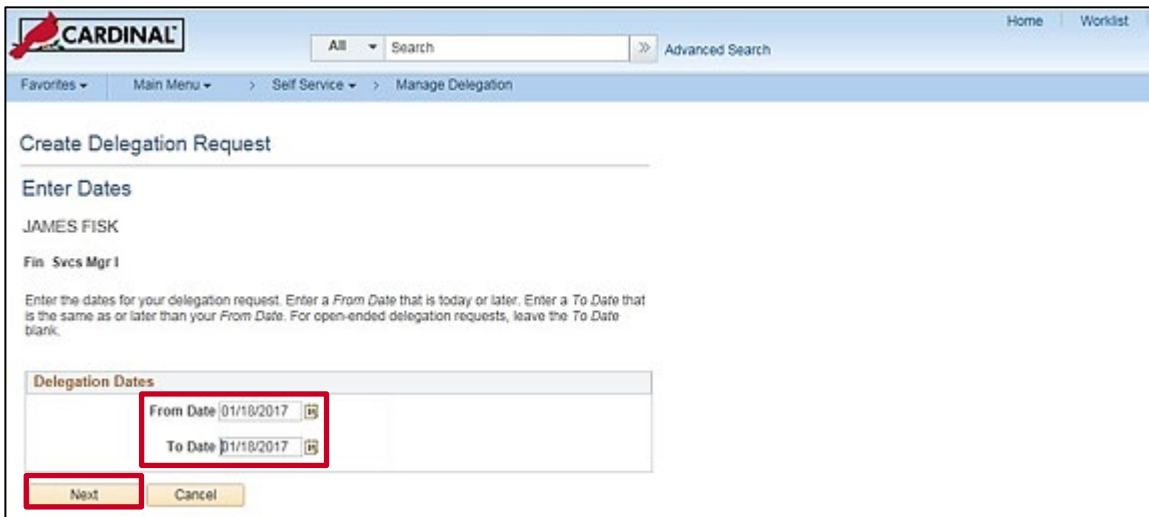
Main Menu > Self Service > Manage Delegation





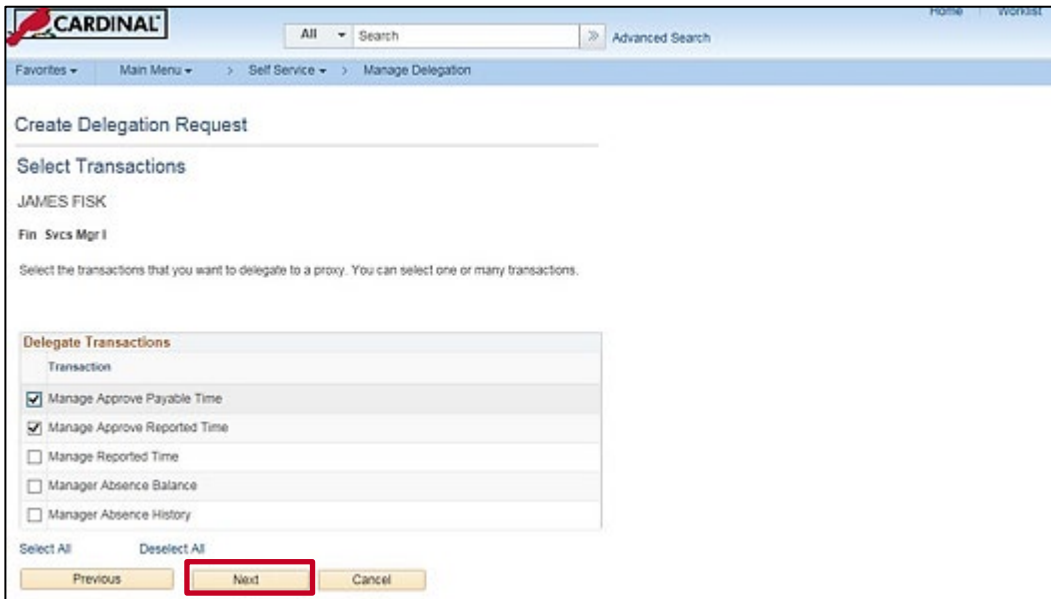
The screenshot shows the 'Manage Delegation' page in the Cardinal system. The page header includes the Cardinal logo, a search bar, and navigation links for Home and Worklist. The main menu shows 'Self Service' > 'Manage Delegation'. The page title is 'Manage Delegation' and the user is 'JAMES FISK'. A message explains that self-service transactions can be delegated. A link 'Learn More about Delegation' is provided. Below, there are three options: 'Create Delegation Request' (highlighted with a red box), 'Review My Proxies', and 'Review My Delegated Authorities'.

3. The **Manage Delegation** page displays.
4. Click the **Create Delegation Request** link.



The screenshot shows the 'Create Delegation Request' page in the Cardinal system. The page header is the same as the previous screenshot. The main menu shows 'Self Service' > 'Manage Delegation'. The page title is 'Create Delegation Request' and the user is 'JAMES FISK'. Below the title, it says 'Enter Dates' and 'Fin Svcs Mgr I'. A message explains the date requirements. There is a 'Delegation Dates' section with two date pickers: 'From Date' (01/18/2017) and 'To Date' (01/18/2017), both highlighted with red boxes. At the bottom, there are 'Next' and 'Cancel' buttons, with 'Next' highlighted by a red box.

5. The **Create Delegation Request** page displays.
6. Enter the **From Date**. This is the date you want the delegation to begin.
7. Enter the **To Date**. This is the date you want the delegation to end.
8. Click the **Next** button.



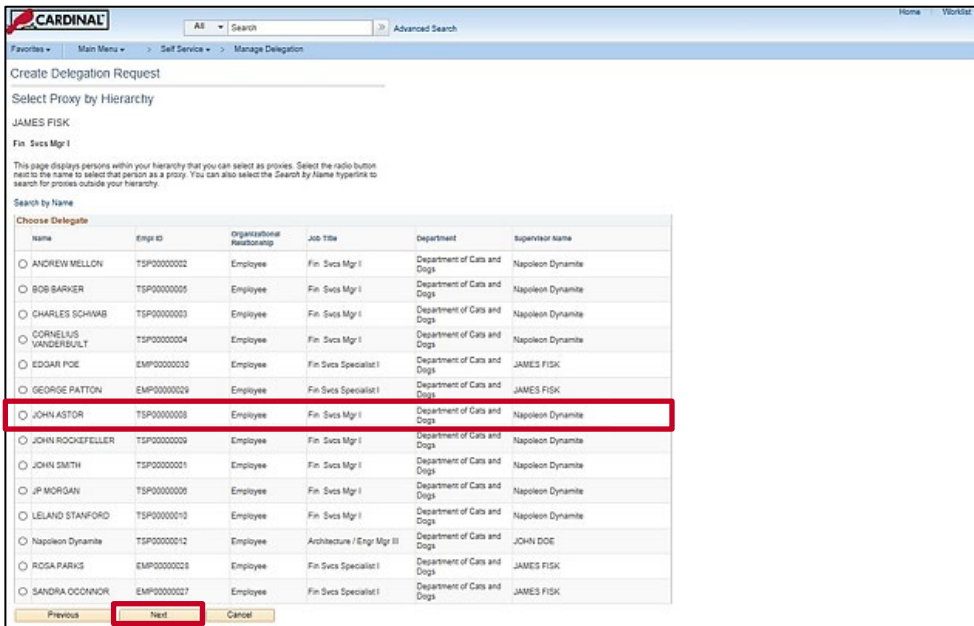
The screenshot shows the 'Create Delegation Request' page in the Cardinal system. The user is logged in as JAMES FISK, a Financial Services Manager. The page title is 'Create Delegation Request' and the sub-header is 'Select Transactions'. Below this, it says 'Select the transactions that you want to delegate to a proxy. You can select one or many transactions.' There is a table titled 'Delegate Transactions' with a 'Transaction' column. The table contains five rows: 'Manage Approve Payable Time' (checked), 'Manage Approve Reported Time' (checked), 'Manage Reported Time' (unchecked), 'Manager Absence Balance' (unchecked), and 'Manager Absence History' (unchecked). At the bottom of the table are 'Select All' and 'Deselect All' links. Below the table are three buttons: 'Previous', 'Next' (highlighted with a red box), and 'Cancel'.

Transaction
<input checked="" type="checkbox"/> Manage Approve Payable Time
<input checked="" type="checkbox"/> Manage Approve Reported Time
<input type="checkbox"/> Manage Reported Time
<input type="checkbox"/> Manager Absence Balance
<input type="checkbox"/> Manager Absence History

Select All Deselect All

Previous **Next** Cancel

9. The **Create Delegation Request – Select Transactions** page displays.
10. Select the transactions you want to delegate by clicking the **check-box** next to the item. Typically, check all available selections so the proxy can view and approve time and absences and make adjustments if needed.
11. Click the **Next** button.



Cardinal All Search Advanced Search Home Worklist

Favorites Main Menu Self Service Manage Delegation

Create Delegation Request

Select Proxy by Hierarchy

JAMES FISK
Fin Svcs Mgr I

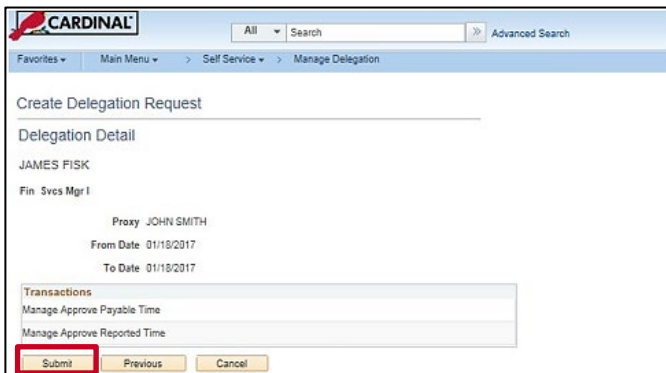
This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the Search by Name hyperlinks to search for proxies outside your hierarchy.

Search by Name

Choose Delegate	Name	Emp ID	Organizational Relationship	Job Title	Department	Supervisor Name
<input type="radio"/>	ANDREW MELLOW	TSP00000002	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	BOB BARKER	TSP00000005	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	CHARLES SCHWAB	TSP00000003	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	CORNELIUS VANDERBILT	TSP00000004	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	EDGAR POE	EMP00000030	Employee	Fin Svcs Specialist I	Department of Cats and Dogs	JAMES FISK
<input type="radio"/>	GEORGE PATTON	EMP00000029	Employee	Fin Svcs Specialist I	Department of Cats and Dogs	JAMES FISK
<input type="radio"/>	JOHN ASTOR	TSP00000008	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	JOHN ROCKEFELLER	TSP00000009	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	JOHN SMITH	TSP00000001	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	JP MORGAN	TSP00000006	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	LELAND STANFORD	TSP00000010	Employee	Fin Svcs Mgr I	Department of Cats and Dogs	Napoleon Dynamite
<input type="radio"/>	Napoleon Dynamite	TSP00000012	Employee	Architecture / Engr Mgr II	Department of Cats and Dogs	JOHN DOE
<input type="radio"/>	ROSAL PARKS	EMP00000028	Employee	Fin Svcs Specialist I	Department of Cats and Dogs	JAMES FISK
<input type="radio"/>	SANDRA O'CONNOR	EMP00000027	Employee	Fin Svcs Specialist I	Department of Cats and Dogs	JAMES FISK

Previous **Next** Cancel

12. The **Create Delegation Request – Select Proxy by Hierarchy** page displays.
13. Cardinal allows the option to choose the employee delegation within your hierarchy. To do so, click the **Indicator** next to the employee's name. It is recommended that you delegate to a peer or an approver above you, not to a subordinate that reports to you even if this person has the approver role. This will avoid a circular workflow issue with your own time, which you cannot approve.
14. Click the **Next** button to access the **Create Delegation Request – Delegation Detail** page.



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Create Delegation Request

Delegation Detail

JAMES FISK
Fin Svcs Mgr I

Proxy JOHN SMITH
From Date 01/19/2017
To Date 01/19/2017

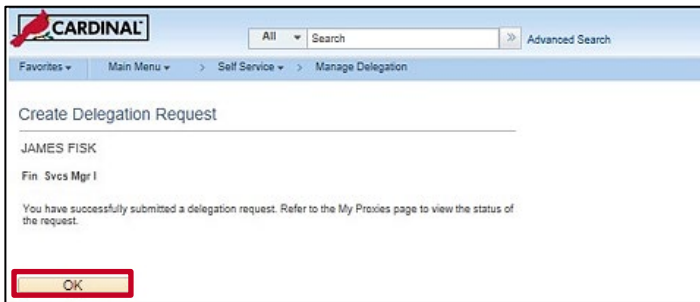
Transactions

Manage Approve Payable Time

Manage Approve Reported Time

Submit Previous Cancel

15. The name of the **Proxy** displays.
16. Click the **Submit** button.

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17. A message displays confirming that you have successfully submitted a delegation request. The proxy (person to whom you have delegated) must accept the request.
18. Click the **OK** button.

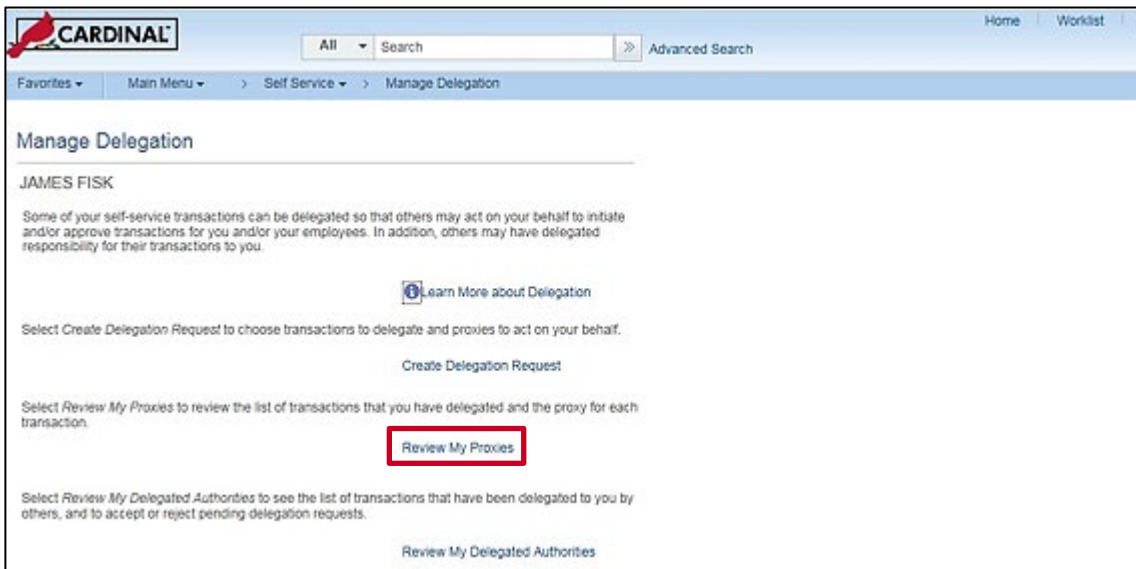
Revoking Your Worklist

The following steps show you how to revoke (take back) your worklist.

Note: Delegations will automatically expire on the **To Date** selected. Revoking is only necessary if you want to take back the worklist prior to the **To Date**.

19. Navigate to the **Manage Delegation** page using the following path:

Main Menu > Self Service > Manage Delegation



Manage Delegation

JAMES FISK

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select **Create Delegation Request** to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select **Review My Proxies** to review the list of transactions that you have delegated and the proxy for each transaction.

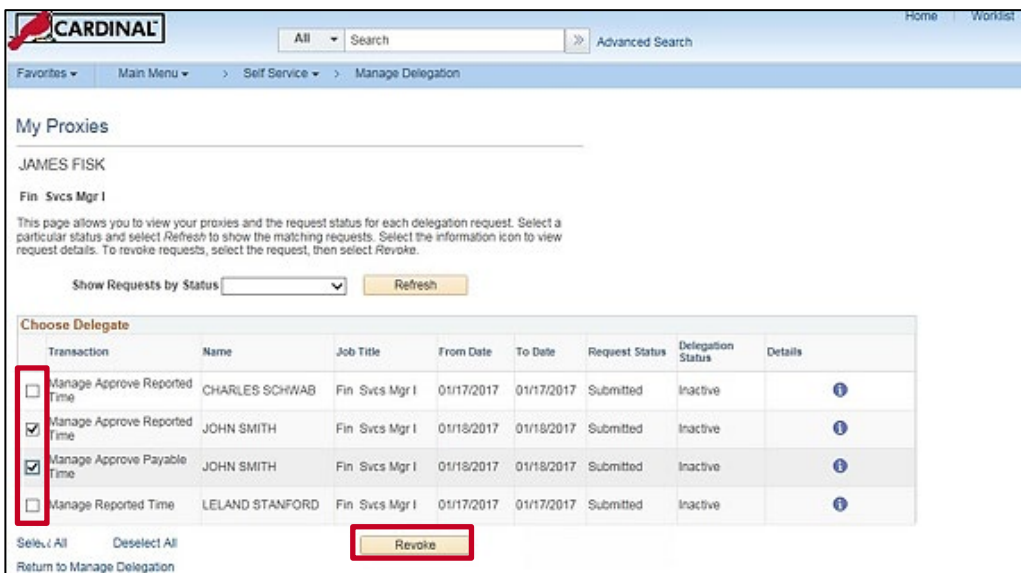
Review My Proxies

Select **Review My Delegated Authorities** to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

[Review My Delegated Authorities](#)

20. The **Manage Delegation** page displays.

21. Click the **Review My Proxies** link.



My Proxies

JAMES FISK

Fin Svcs Mgr I

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and select **Refresh** to show the matching requests. Select the information icon to view request details. To revoke requests, select the request, then select **Revoke**.

Show Requests by Status: [Refresh](#)

Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input type="checkbox"/> Manage Approve Reported Time	CHARLES SCHWAB	Fin Svcs Mgr I	01/17/2017	01/17/2017	Submitted	Inactive	i
<input checked="" type="checkbox"/> Manage Approve Reported Time	JOHN SMITH	Fin Svcs Mgr I	01/18/2017	01/18/2017	Submitted	Inactive	i
<input checked="" type="checkbox"/> Manage Approve Payable Time	JOHN SMITH	Fin Svcs Mgr I	01/18/2017	01/18/2017	Submitted	Inactive	i
<input type="checkbox"/> Manage Reported Time	LELAND STANFORD	Fin Svcs Mgr I	01/17/2017	01/17/2017	Submitted	Inactive	i

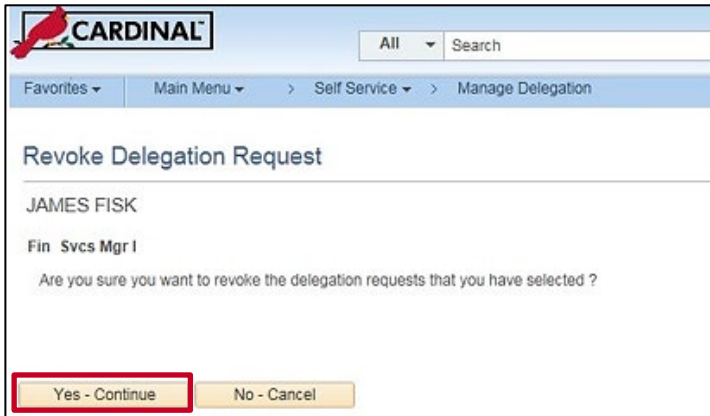
Select All Deselect All [Revoke](#)

[Return to Manage Delegation](#)

22. The **My Proxies** page displays.

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23. Click the **check-box** next to the transaction(s) that you want to revoke.
24. Click the **Revoke** button.



CARDINAL

All Search

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Revoke Delegation Request

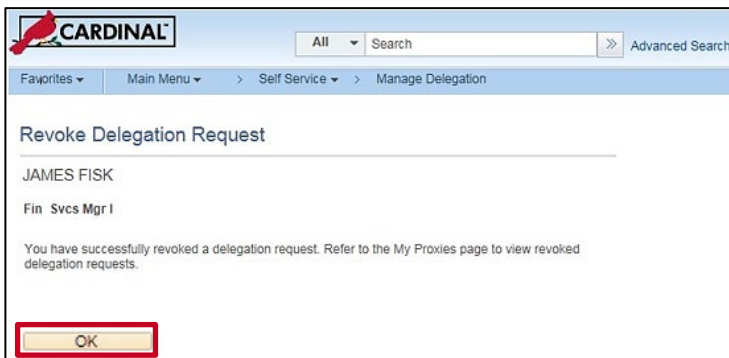
JAMES FISK

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Are you sure you want to revoke the delegation requests that you have selected ?

Yes - Continue No - Cancel

25. Click the **Yes – Continue** button to confirm.



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All Search Advanced Search

Favorites Main Menu Self Service Manage Delegation

Revoke Delegation Request

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You have successfully revoked a delegation request. Refer to the My Proxies page to view revoked delegation requests.

OK

26. Click the **OK** button.